



Generic Asset Ordering

Job Aid

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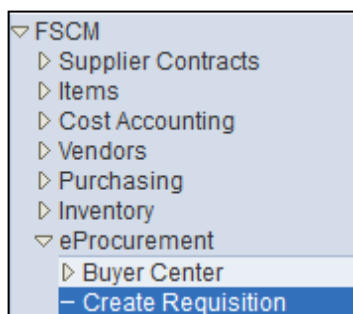
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Purchasing a Non-Contracted Asset

When making a one-time purchase of a generic asset follow the steps below to add all necessary additional information on the Requisition. If there is a tagged asset there must be an item id used. Generic Asset Items IDs have very general descriptions, and cover broad groups of items based on the NIGP code category they are included within. This means that when searching for Generic Assets the specific item being search for may not be on the list, but the category that the items falls within will be. Obtain the Item ID for the generic asset by clicking on the provided link: <http://tn.gov/generalserv/cpo/documents/GenericAssets.pdf>.

Create Requisition

Follow the steps below to navigate to the Create Requisition screen.



1. Click **Main Menu**.
2. Click **FSCM**.
3. Click **eProcurement**.
4. Click **Create Requisition**.

This is the main page for creating a Requisition, and has links that will go to the various sections that need to be completed. The sections are grouped under three main tabs, and are highlighted in yellow to identify which tab is being accessed.

A screenshot of the 'Create Requisition' web form. The form has a title bar with three tabs: '1. Define Requisition' (highlighted in yellow), '2. Add Items and Services', and '3. Review and Submit'. Below the tabs, there is a section for specifying requisition details. It includes fields for 'Business Unit' (32101 General Services), '*Requester' (alys0728001 Alyssa Cave), 'Requisition Name' (test), 'Doc Type' (DCR), '*Currency' (USD), and 'Priority' (Medium). There is a 'Continue' button at the bottom left of the form.

Confirm that you **business unit** and your **requester** have defaulted correctly.

5. Enter a **Requisition Name**. This should include a description of what is being purchased.
6. Enter the **Doc Type**.
7. Click **Continue** to be automatically be brought to the **Add Items and Services** tab.

Add Items and Services

8. Click on the **Catalog** tab.

Browse Catalog ?

*Select a catalog: All Procurement Items 3/9/2014

☐ [All Procurement Items](#)

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

Search Catalog ?

Search contains all of the following search fields entered:

Description:

Manufacturer:

Manufacturer's Item ID:

Vendor:

Vendor Item ID:

Item ID:

[Search](#) [Search Settings](#)

9. Enter the Item ID for the Generic Item in the **Item ID** field.

10. Click **Search** to populate the item.

Item Description	Vendor	Manufacturer	Price	UOM	Quantity
Air Conditioning Units, Portab			0.00000 USD	Each	1.0000

[Add](#)

11. Enter the correct **Quantity**.

12. Click **Add**. Confirm that the items have been added in the Requisition Summary box.

Description	Qty	UOM
Flag, TN, outdoor, 3' X 5...	10	EA

Total Lines: 1

Total Amount (USD): 102.40

Review and Submit

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 32101 General Services

*Requester: alys0728001 Alyssa Cave

Requisition Name: test

Doc Type: LPA

*Currency: USD

Priority: Medium


Requisition Lines ?

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Backhoe (For Farm Tractor), Ge		10.0000	Each	0.00000	0.00

[Select All / Deselect All](#)

Total Amount: 0.00 USD

[Add to Favorites](#) [Add to Template\(s\)](#) [Modify Line / Shipping / Accounting](#) [Delete](#)

13. Click on the **Review and Submit** tab to be taken to the next screen.
14. Click on the line details icon  to access the Line Details screen. This screen will be used to enter more information about the generic asset that is being purchased.
15. Enter the correct price in the **Price** field.
16. Enter the Vendor ID in the **Vendor** field.

Create Requisition

Line Details

Line: 1 [Soda Fountain Equipment and Ac](#) Line Status: Pending

Item Details ?

Merchandise Amt: 0.00 USD Price: 0.00000

Category: 037-75 [View Hierarchy](#)

Description: Soda Fountain Equipment and Ac

Buyer: alys0728001 [Buyer Information](#)

Vendor:

Vendor Location:

Vendor's Catalog:

Vendor Item ID:

Manufacturer ID: UPN ID:

Manufacturer:

Manufacturer's Item ID:

Physical Nature: Goods

☐ RFQ Required ☒ Zero Price Indicator ☐ Amount Only

☐ Device Tracking ☐ Stockless Item ☐ Inspection Required

[Configuration Info](#)

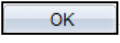
17. Click  to return to the Review and Submit tab.
18. Click on the **Add/Edit Comments** icon  to access the Line Comments screen.

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Soda Fountain Equipm	10.0000	Each	USD

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

19. Enter a detailed description of the item that is being purchased.
20. Check the **Send to Vendor** checkbox. This will ensure that the comments entered will populate on the Purchase Order and be sent to the vendor.
21. Click  to return to the **Review and Submit** tab.

Follow the steps below to add both shipping and accounting information to a line.

The screenshot shows the 'Requisition Lines' window. At the top, there's a table with columns: Line, Description, Vendor Name, Quantity, UOM, Price, and Total. Line 1 is selected, with Description 'test', Quantity '120.0000', UOM 'Each', Price '0.00000', and Total '0.00'. Below this, there are checkboxes for 'Consolidate with other Reqs' and 'Override Suggested Vendor'. The 'Shipping Line' section shows 'Shipping Line: 1', 'Due Date:', 'Quantity: 120.0000', 'Price: 0.00000', 'Status: Active', '*Ship To:', 'Attention To: Alyssa Cave', and '*Distribute By: Qty'. There's a 'SpeedChart:' field. The 'Accounting Lines' section is expanded, showing a table with columns: Line, Dist Type, *Location, Quantity, Percent, Merchandise Amt, and GL Unit. Line 1 is selected, with Dist Type 'Open', *Location '0000017045', Quantity '120.0000', Percent '100.0000', Merchandise Amt '0.00', and GL Unit '32101'.

22. Click on the **Expand Section** arrow.

23. Enter the **Ship To** information.

24. Enter the accounting information using either option provided below.

- The SpeedChart is a value used to represent a series of Chartfield values. It allows the user to enter a SpeedChart value for each of the fields it represents.

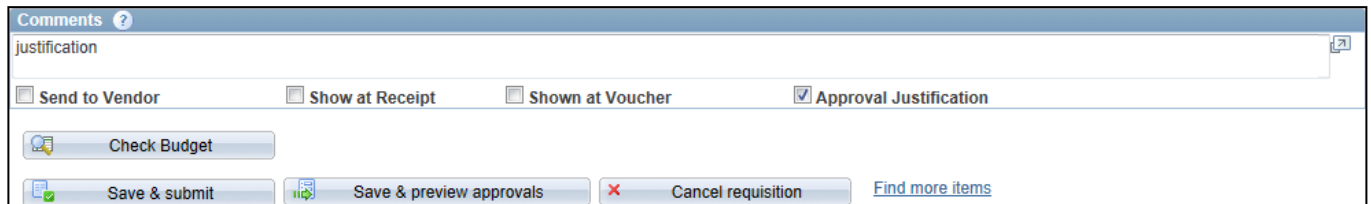
SpeedChart:

OR

- Chartfields are the fields that provide the system with the basic structure to segregate and categorize transactional and budget data. The Requisition's budget is based on the chart field values entered. The required Chartfields include: GL Unit, Account, Department Id, Fund and Location CF. This same information will also be applicable on the purchase order.

The screenshot shows the 'Accounting Lines' window. It has tabs for 'Chartfields1', 'Chartfields2', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Chartfields1' tab is selected, showing a table with columns: Line, Dist Type, *Location, Quantity, Percent, Merchandise Amt, and GL Unit. Line 1 is selected, with Dist Type 'Open', *Location '0000017045', Quantity '120.0000', Percent '100.0000', Merchandise Amt '0.00', and GL Unit '32101'.


Writing a detailed justification ensures that your Requisition gets approved in a timely manner. Justifications should always include the date, your name, a detailed explanation of why you need the product or service, and any necessary internal approvals. The Approval Justification checkbox must be checked for justification comments to be viewable during approvals.






Comments ?

Justification

☐ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☒ Approval Justification

 Check Budget

 Save & submit  Save & preview approvals  Cancel requisition [Find more items](#)

25. Type in your Justification in the **Comments** field.
26. Click the **Approval Justification** checkbox.
27. Click **Save & Preview Approvals**.

After the Requisition is created it must be budget checked before processing further. When a Requisition is successfully budget checked funds are subtracted from the available budget and a pre-encumbrance is generated for the Requisition amount.



Confirmation

Requested For:	Alyssa Cave	Number of Lines:	1
Requisition Name:	test	Total Amount:	0.00 USD
Requisition ID:	0000026958		
Business Unit:	32101		
Status:	Open		
Priority:	Medium		
Budget Status:	Not Checked		

28. Click **Check Budget**, and confirm that the budget status has changed to valid.
29. After the status has changed click **Submit** to finalize your Requisition.